FY11 Salary Planner and Finance Budget Development Checklist

1. Upon receipt review Budget Base for errors/omissions.


3. Enter Salary Planner through Self Service Banner, Budget Management Tab (see Tutorial for specific Salary Planner instructions).

4. Enter all salary/job distribution changes if applicable.

5. Review Job Detail screen for all employees.

6. Enter all position increases.

7. Enter all position distribution changes if applicable.

8. Review List by Position screen to ensure:
   - All full-time position budgets are equal to or greater than the corresponding full-time employee’s salary,
   - All pooled position budgets (including Overtime and Supplemental Pay positions) are sufficient to fund anticipated FY11 part-time employee or student hours worked for all employees in the pooled position
   - Vacant position budgets are equivalent to the anticipated annual salary of the new employee

9. Enter Finance Budget Development through Banner Self Service, Budget Management Tab (see tutorial for specific Finance Budget Development instructions)

10. Enter line item/account code budgets for FY11
    Remember to use the correct Org/Fund combination, otherwise you will create fictitious budgets.
    Please do not budget INACTIVE funds

11. After saving your work in Finance Budget Development, go to the Web FOCUS dashboard to run your salary and balancing reports

12. Remember there is a 30 minute delay from when you enter your Salary Planner information until Finance Budget Development is updated to reflect those changes. If you run your balancing reports too soon, the changes made in Salary Planner will not appear in your reports. All changes made to Finance Budget Development are immediate and without delay.

13. Select the Salary Planner domain in the Web FOCUS dashboard

Updated 3/9/10
14. Run PWB0006 for staff and PWB0010 for faculty.

15. Run PWB0005 to confirm that all of your position budgets and salary increases are correct:
   The Org/Fund/Account totals should match your Finance Budget Development report totals by FOAPAL.
   PWB0005 is available only in Excel, but is easy to sort by position number, employee name, etc.

16. Select the Finance Budget Development Domain in the Web FOCUS dashboard

17. Run FBR011 to confirm that your total matches your FY11 Budget Base total

18. Review your FY11 Budget Base again to confirm that you have addressed every item included for FY11

19. Save all of your final balanced reports